RSR Data Updates and Reports



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This document provides instructions for running data quality reports, making data corrections, and creating the RSR XML and zip code files.

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Navigating to RSR Reports

1. To navigate to the reports you will run as part of the RSR, first log in to the Massachusetts CAREWare system.

Ryan White HIV	Customize Add Client Find Client Reports Rapid Entry	
** Connected to the MDPH TEST CAREWare Server **	Submit Login Enter your CAREWare Username Username:	Appointments My Settings System Information System Messages Administrative Options Switch Providers Log Off

- 2. Click on "Reports" from the main menu.
- 3. This will bring up a Reports menu of different types of reports that can be run.

CAREWare Reports						
OCAREWare Reports						
HRSA Reports	RSR And ADR					
Custom Reports	Run Or manage custom reports					
Performance Measures	Run Or Manage Performance Measures					
Client Data Reports	Run reports on client information					
Financial Report	Setup And run the financial report					



CAREWare Reports for Data Quality

Several reports, including custom reports, are available in CAREWare MA to help you review data quality in preparation for generating the RSR. To get to the Custom Reports screen, go to the reports menu and click on "Custom Reports," then "Manage/Run Custom Reports". When running Custom Reports, select the desired report and specify the date span. Finally, click "Run Report", to run the report.

CAREWare Reports		CAREWare Reports > Custom Reports	
CAREWare F	Reports	Back	
HRSA Reports	RSR And ADR	●Custom Reports	
Custom Reports	Run Or manage custom reports	Manage/Run Custom Reports	Run Or manage custom reports
Performance Measures	Run Or Manage Performance Measures	Export Custom Reports	Export custom report definitions to a portable xml file
Client Data Reports	Run reports on client information	Import Custom Reports from an xml file	Import custom report definitions from a portable xml file
Financial Report	Setup And run the financial report		

TLS Missing Ryan White Eligibility

This report shows a list of clients that are not eligible for receiving Ryan White services. If your agency receives funding through the MA Department of Public Health and submits an RSR report to HRSA, we recommend running this report before you submit the RSR to make sure it includes all of your Ryan White eligible clients. That way all of your eligible clients will be reported to HRSA.

CAREWare Reports > Custom Re	eports > Manage/R	tun Custom Repo	rts				
Manage / Run Add Delete	Make Read Only	Back Help	Print or Export	Hide/Show Columns			
Manage/Run Custom Reports							
Search:							
Name	CrossTab	Report Type	Description	Read Only			
TLSClientList		Demographics					
TLSMissingClientStatus		Demographics					
TLSMissingDemographics		Demographics					
TLSServiceDetailReport		Service					
TLSMissingRyanWhiteEligibility		Demographics					
TLSMissingAnnualReviewMedical		Demographics					
List of ISP Services		Service					

1. Select TLSMissingRyanWhiteEligibility from the list of reports and select "Manage Run".

CAREWare Rep	ports > Custom	Reports > Manage Run	Custom Reports		
Manage Run	Add Delete	Make Read Only B	ack Help Print	or Export	
Manage	Run Cu	stom Repor	ts		
Search:					
Name	*	CrossTab	Report Type	Description	Read Only
TLSMissingDem	ographics		Demographics		
TLSMissingRyar	nWhiteEligibility		Demographics		
TLSServiceDeta	ilReport		Service		
Viiral Load Supp	pression <=199		Lab		
Viral Load List (A	All Results)		Lab		
Viral Load Suppl	ression >=200		Lab		



2. Under the report page for TLSMissingRyanWhiteEligibility, select "Run Report".

CAREWare Reports > Cust Back	om Reports > Manage/Run Custom Reports > TLSMissingRyanWhiteEligibility
TLSMissing	RyanWhiteEligibility
Run Report	Start Date 01/01/2024, End Date 12/31/2024, Clients with services
Report Layout	TLSMissingRyanWhiteEligibility, Demographics
Field Selection	Name, Gender, DOB, Race/Ethnicity, Enrl Date, Enrl Status, Is RW Eligible?, Last RW Service
Report Filter	Is RW Eligible In Span (Date Span Between 365 AND 0 days before the end date or as of date (1/2/2024 And 12/31/2024). AND Cross-Provider = No) = No AND Has RW Funded Service = Yes

3. Modify the date range to the desired range.

CAREWare Reports > Custom Reports > Mar	nage/Run Custom Re	eports > TLSMissingRy	anWhite	Eligibility > Run Report
Open in New Tab PDF CSV CSV W	/ith Specs Excel	Save to My Reports	Back	Help
Run Report				
	Parameters			
Date From:	01/01/2024			
Date Through:	12/31/2024			
Clinical Review Year:	2024			
Show New Clients only:				
Show Clients With Service only:				

- 4. Run the report by clicking on the desired format (Open in a New Tab, PDF, CSV Excel). Click on "Run Report".
- 5. The report will look like this:

TLSMissingRyanWhiteEligibility								
Data Scope: Report Start Date: Report End Date:	MDPH 01/01/202 12/31/202	4						
Nam e;	Gender:	DOB:	Race/Ethnicity:	Enrl Date:	Enrl Status;	Is RW Eligible?:	Last RW Service:	
asd, asd	Male	01/01/1970	Not Specified	06/01/2018	Active	No	11/20/2024	
asd, asd asd	Male	10/10/1970	Not Specified	01/08/2019	Active	No	11/20/2024	
Brumbeloe, Jared	Male	02/20/1991	Not Specified		Active	No	03/26/2024	
Bunny, Buggz	Male	11/18/1986	Hispanic	05/01/2019	Active	No	11/20/2024	
Gilmore, Lorilei	Female	02/22/1961	White (non-Hispanic)		Active	No	11/20/2024	
Snow, John	Male	09/16/1972	White (non-Hispanic)	03/25/2021	Active	No	11/20/2024	
Snow, John	Female	03/01/1990	Not Specified		Active	No	02/01/2024	
Test, Jones	Female	05/16/1962	Not Specified		Active	No	05/02/2024	

Number of Records : 8 (Count is unduplicated across providers)





Correcting Ryan White Eligibility Status

Follow these steps to update a client's Ryan White Eligibility Status:

1. Navigate to the client record Demographics page and select "Eligibility".

Find Client > Search Results >	Demographics
Demographics	
Personal Info	Client ID: Name: Smith, Mary Gender: Female DOB: 02/14/1952
Change URN	MR\$10214522U
Contact Information	No description supplied
Race/Ethnicity	No description supplied
HIV Risk Factors	No description supplied
Vital and Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White

2. Select "Start".

Find Client >	Search Res	sults > Demo	graphics >	Eligibility His	tory			
View Start	Stop E	dit Delete	Help B	ack Print or	Export Hi	ide/Show (Columns	
Eligibi	lity His	story						
Search:								
Date	ls Elig	ible Funding	Ryan Whi	ite Funde Pro	vide Comme	nt		

3. Edit the date the client became eligible for Ryan White Services. Use 12/31/2023 if there is not a specific eligibility date.

Find Client > Search	Results > Demographics > Eligibility History
Save Cancel	
Edit	
Eligibility Date:	12/31/2023
Is Eligible:	Yes
Funding Source:	Part B
Comment:	

- 4. Select "Part B" for the funding source.
- 5. Click "Save".



Clients with Missing Zip Code Report & Correcting Missing ZIP Codes

This report shows a list of clients with missing ZIP codes. Run this report before you submit the RSR to make corrections for clients whose ZIP codes were not filled in.

1. Under CAREWare Reports, select "Performance Measures" then "Create Client List."

CAREWare Reports	Performance Meas	ures
HRSA Reports RSR And ADR		
Custom Reports Run Or manage custom reports	Run Performance Measures	Evaluate the current status of one o
Performance Measures Run Or Manage Performance Measures	Create Client List	Examine clients in the performance

2. To find the missing ZIP code report, type "zip" into the search bar and the report will appear. Select it by highlighting the row and click "Use Selected" to run the report.

CAREWare Repo	orts > Performance Measures > Client List		
Use Selected Back Print or Export			
Client List			
Search: zip			
Code	Name	Description	
ZIP01	Clients with missing zip code	Produce list of clients with a missing zip code	

3. Select "Edit". Edit the "As of Date" to 12/31/2024 then select "Save".



4. Select "Create Client List".





- 5. A new tab will open with a list of clients. You can select a client by double clicking on their name, or highlighting the row and click "Go To Client", which will bring you to the Demographics page of the client record where you can add their ZIP code. For clients with an unknown ZIP Code:
 - a. Use ZIP Code of service location as proxy
 - b. If that is unavailable, report client's ZIP Code as "99999"

HRSA Reports

Click on "HRSA Reports" to get started.

CAREWare Reports			
CAREWare Reports			
HRSA Reports	RSR And ADR		
Custom Reports	Run Or manage custom reports		
Performance Measures	Run Or Manage Performance Measures		
Client Data Reports	Run reports on client information		
Financial Report	Setup And run the financial report		

RSR ZIP Code Count Report

This report will generate a list of clients and their ZIP codes. You will need to download and save this as a CSV to upload when submitting the RSR.

1. Select "RSR Zip Code Count Report".

HRSA Reports			
RSR Client Report	Create the RSR client level data file		
RSR Viewer	View RSR files		
RSR Validation Report	View the RSR Validation Report		
RSR Zip Code Count Report	View the RSR Zip Code Count Report		



2. Select "Edit" to modify the year to 2024. Then "Save."

CAREWare Reports > HRSA Reports > RSR Zip Code Report Settings	Save Cancel
Edit Edit Filter Open In New Tab CSV Back	RSR Zip Code Report Settings
RSR Zip Code Report Settings	Year: 2024
Apply Filter:	Apply Filter:
Filter Description: Report Filter is empty	Filter Description: Report Filter is empty

3. Click on "CSV" to run the report.

CAREWare Reports	HRSA Reports > Edit Filter > RSR Zip Code Report Settings Open In New Tab CSV Back
RSR Zip C	code Report Settings
Year:	2024
Apply Filter:	
Filter Description:	Report Filter is empty

4. Click "Download RSR Zip Code Count Report" and save to a secure folder on your computer.



RSR Validation Report

The RSR Validation report provides a list of all errors, warnings and alerts that are built into HRSA's Electronic Handbook (EHB). Warnings and alerts indicate areas where data may be incorrect or missing. However, not all warnings or alerts may need to be corrected. Warnings must have a comment explaining the data in the EHB.

1. From the HRSA Reports menu, click on "RSR Validation Report".



2. From the "RSR Validation Report Settings" page, select "Edit" to adjust the reporting year to 2024. Then click "Save" and "Run".



3. Click "View RSR Validation Report" from the pop-up that appears to view the report table. From the table, you can click any row with errors that need correcting by highlighting the row and clicking "View Client List" or double clicking the highlighted row.





4. Choose the client of interest and then click "Go to Client" to be brought directly to their record. Errors must be fixed before the RSR can be submitted.

CAREWare Repo	rts >	HRSA Report	ts > R	
Go To Client	ack	Print or Exp	ort	
Clients missing Pove				
Search:				
Client		Viewed		
smith, rob				
MDPH, Testing				
Jacks, Apple				
Nazarian, Greg G				
Haste, Holly				
Edwards, Alyssa				

RSR Client Report (Running the RSR XML File)

The Client Report Viewer allows you to view the data included in the RSR file, including a count of missing data. This will help you make sure your XML is complete before it is uploaded to the EHB.

1. From the HRSA Reports menu, click on "RSR Client Report".



2. Make sure the "Year" is 2024 and click "Run" to generate the report. Once it is finished, click "Download RSR file" in the pop-up window in the top right corner of the page.

CAREWare Reports > HRS/	A Reports > RSR Settings		
Edit Edit Filter Run H	Help Back		\mathbf{x}
RSR Settings		0	Report complete
Year:	2024		Download RSR file
Cross Provider ART:	No sharing set up		
Cross Provider Eligibility:	No sharing set up		
Cross Provider Labs:	No sharing set up		

3. Save the RSR file to a secure folder on your computer. This is the RSR XML that you need to access in the next section of this guide.



RSR Viewer (Viewing the RSR XML file)

1. From the HRSA Reports page, select "RSR Viewer", then click "Choose File" to upload the RSR export file saved in your agency's folder.



2. Once the file has finished uploading, click "View RSR File". A new window will open showing the components of the RSR. To select a category, highlight the row and click "View Client List", or just double click the row.

CAREWare Reports > HRSA Reports > RSR Viewer	CAREWare Repor	ts > HRSA Re	eports > RSR Viewer > M	IDPH 2024 RSR Viewer
View RSR File Help Back	View Client List Back Print or Export Hide/Show Columns			
RSR Viewer	MDPH 20	24 RSF	R Viewer	
RSR File Name: Choose File 2024_RSR_Export.xml	Search:			
	Category	Count	Percent	
	Total Clients (any se	2	100%	
	Clients with Core M	1	50.0%	
	Clients with OAHS/	1	50.0%	
	Clients with OAHS/	1	50.0%	
	Clients with OAHS/	1	50.0%	
	HIV+ Clients with O	0	0.0%	
	Female HIV+ Client	0	0.0%	
	2. Vital Status (OAF	1		
	2. Alive:	1	100.0%	

3. Within the category field you clicked, you can select the client record you wish to review. Once you have viewed the client, an X will appear under the "Viewed" column to reflect which clients have been reviewed.





Submitting the RSR

1. Once you have reviewed the RSR XML file, you will need to upload it to the HRSA web application along with the RSR ZIP Code Count Report. <u>Click here</u> to access the HRSA web application and complete your RSR submission.

Should you need further assistance logging into the EHBs to submit your RSR see the following resources:

- EHB's Login Process Overview for External User
- How to Login to EHBs using the Multi-factor Authentication Process Video

For more information, see the <u>2024 RSR Instruction Manual</u> or contact the helpdesk at CAREWareMAHelpdesk@jsi.com.